

Committed to Providing Exceptional Customer Service

OSIP Online Services Guide

Actuaries

OSIP Online Services Introduction

What is OSIP Online Services?

OSIP Online Services is the Office of Self Insurance Plans' newest service to facilitate Self Insurance Customers ability to easily fulfill their regulatory obligations more efficiently and effectively by enabling electronic processing.

Users can will file your Annual Report, select or change your actuary (one must be chosen in order to file the Actuarial Summary and Study), and soon file your Financial Statement.

What this guide will Cover:

Registering with The Office of Self Insurance Plans
Accessing the new OSIP Online Services
Logging Into OSIP Online for Actuaries
Navigation in OSIP Online
Submitting an Actuarial Summary and Study
Updating your Actuary Profile
OSIP Online Support

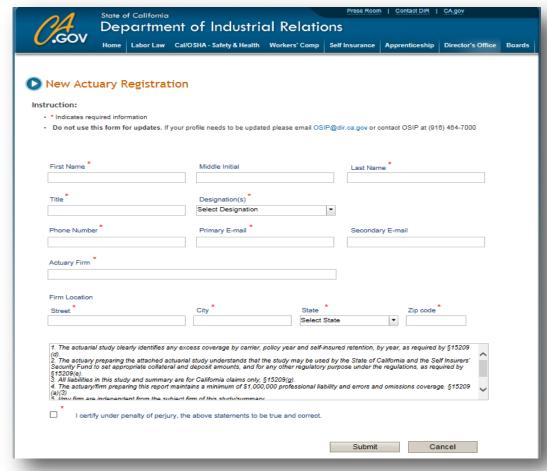
Registering with the Office of Self Insurance Plans

In order to access OSIP Online Services, you must first complete the New Actuary Registration online form.

Please e-mail OSIP@dir.ca.gov for the link to register.

After you submit your completed registration form to OSIP:

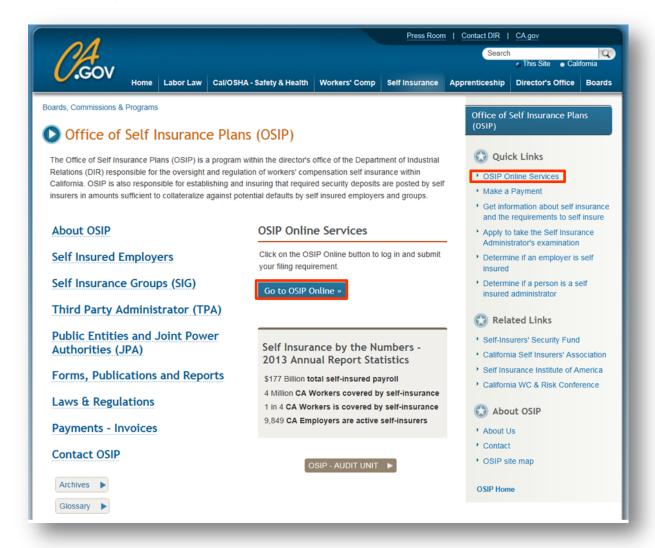
- 1) You will receive a confirmation e-mail of your registration with your User ID and Password to enable you to access OSIP Online.
- 2) Your name is placed on a listing that is made available to the various employers participating in the Self Insurance program with the State of California.



Accessing the new OSIP Online Services Page

OSIP Online Services can be accessed from the OSIP home page by clicking on the OSIP Online Service button near the middle of the home page, or by selecting the OSIP Online Services link in the Quick Links section on the right side of the page.

Please note: the previous Annual Report Quick Link has been removed



Logging into OSIP Online for Actuaries

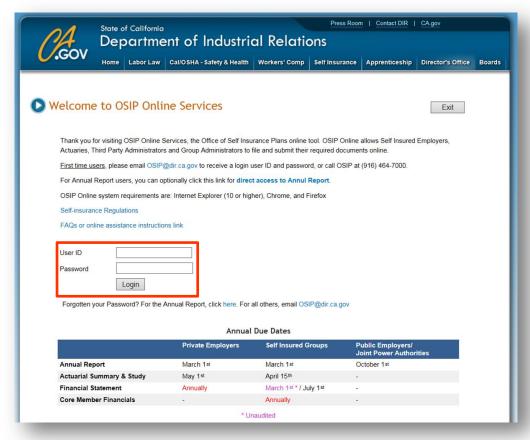
OSIP Online Services page: https://efiling.dir.ca.gov/OSIPO/

First Time and Returning Users: Enter your User ID and Password

New Actuaries: Who are not yet registered with the Office of Self Insurance Plans, please e-mail OSIP@dir.ca.gov

If you have forgot your User ID and/or Password: Please e-mail OSIP@dir.ca.gov

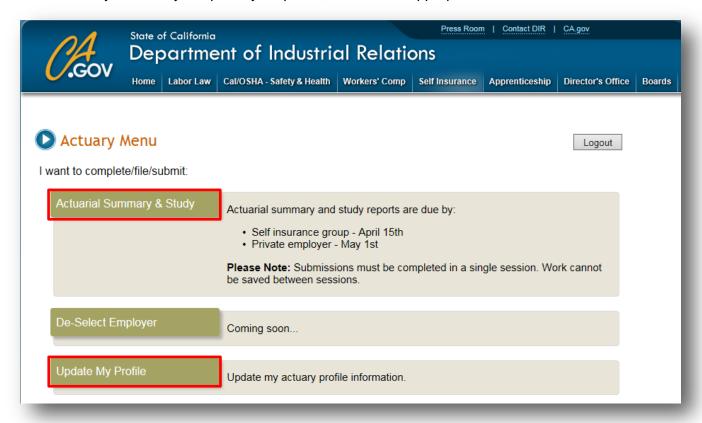
Minimum system requirements: Internet Explorer (8 or higher), Chrome, Firefox, and Safari will allow full functionality of OSIP Online Services.



Navigation in OSIP Online

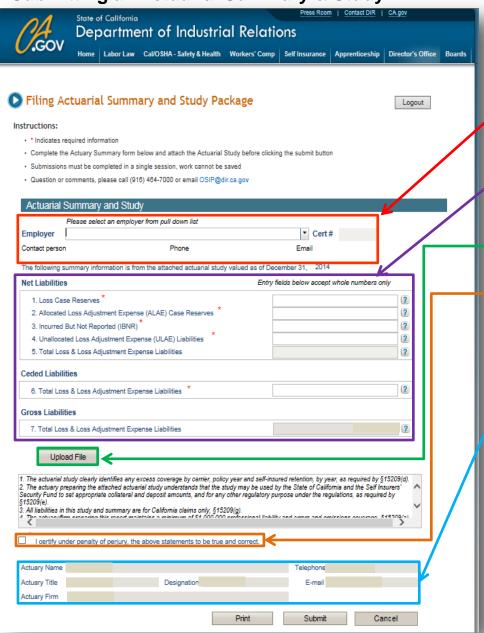
Once logged in, the Actuary Menu will be displayed with your navigation options for tasks you wish to complete. Currently for Actuaries, the "Actuarial Summary and Study" submission, and "Update My Profile" actions are active.

When you have been selected by an employer(s) in OSIP Online, you will receive an email notifying you of your selection(s). This allows OSIP Online to enable you to submit an Actuarial Summary and Study on the employer's behalf and update your Actuary profile. To submit an Actuarial Summary and Study or update your profile, click on the appropriate button.



Please note: a new feature for de-selecting an employer will be available soon. Until then, please email OSIP@dir.ca.gov

Submitting an Actuarial Summary & Study



After the page refreshes, you will be on the "Filing Actuarial Summary and Study Package" form

- 1) From the pull down menu of Employers, select the employer you want to complete the submission for. After selection, the Certificate #, contact person, phone and email address of the employer selected will be displayed.
- 2) Complete the Net and Ceded Liabilities sections, and the Gross Liabilities will calculate the total. If you hover over the "?", you will be provided a definition for each individual item.
- 3) Attach your study information by selecting the upload file button. Please note: The maximum file size that may be attached is 12mb. If your file is larger than this, please e-mail OSIP@dir.ca.gov
- 4) Scroll through the certification statements and check the "I certify..." box confirmation to proceed.
- 5) Your actuarial information will be populated based on your login and registration profile data. Please confirm it is accurate. If not, please e-mail OSIP@dir.ca.gov
- 6) Print/Select/Cancel buttons:

The **Print** button will only print the form itself, not the attachment.

The **Submit** button will send the information from the form and your attachment to OSIP. You will then see a confirmation screen, as well as receive a confirmation email with a copy of the completed form and your file. The employer will also receive a copy of the email.

The Cancel button will take you back to the Actuary Menu page.

Please note:

- a) Information input in the form **cannot** be saved
- b) To Amend an Actuarial Summary & Study, please email OSIP@dir.ca.gov.

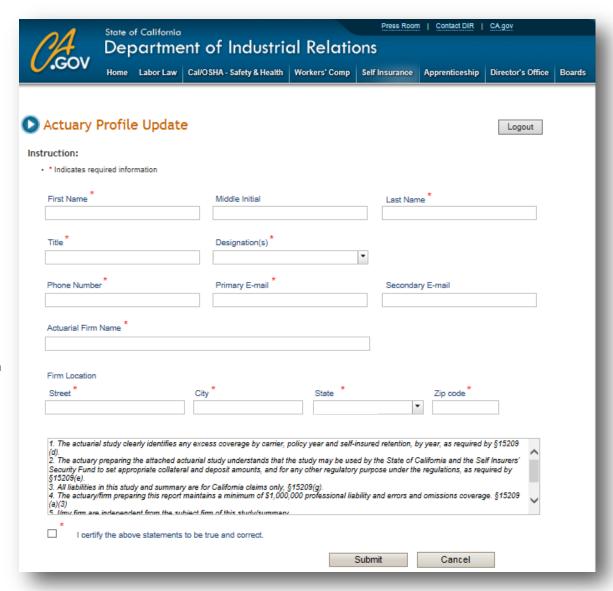
Update My Profile

The form will pre-populate with the most current information provided to OSIP.

Update any fields that need to be changed.

Note: By updating your information, (ex: changing your Actuarial Firm) it does not notify any of your client employers. It only updates your records with OSIP.

The **Submit** button will update the information from the form with OSIP's systems. You will then see a confirmation screen, as well as receive a confirmation email regarding your updates.



OSIP Online Support

- 1) Within OSIP Online itself, there are descriptions associated with each button in the menu screen, and at the top of each form are additional instruction comments. On some screens there are additional information will be displayed.
- 2) User guides are available at:

https://efiling.dir.ca.gov/OSIPO/

3) OSIP collection of Frequently Asked Questions (FAQs):

http://www.dir.ca.gov/osip/OSIP-FAQ.htm

4) Contact OSIP via email:

OSIP@dir.ca.gov

5) Contact OSIP via telephone:

(916) 464-7000